



Filing ID #10022525

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Sarah Ashley Nickloes  
**Status:** Congressional Candidate  
**State/District:** TN02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/15/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AIG [WU]	SP	Undetermined	None		
DESCRIPTION: RETURN OF PREMIUM LIFE INSURANCE					
AMERICAN FUNDS 529 ⇒ American Balanced Fund - 529F1 [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ American Balanced Fund - 529F1 [5P]	SP	\$100,001 - \$250,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ American Balanced Fund - 529F1 [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ American Balanced Fund - 529F1 [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ Capitol Income Builder 529F1 [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: VA					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
AMERICAN FUNDS 529 ⇒ Capitol Income Builder 529F1 [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ Intermediate Bond Fund of America 529F1 [5P]	SP	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ The Bond Fund of America - 529 F1 [5P]	SP	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ The Bond Fund of America - 529 F1 [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ The Bond Fund of America - 529 F1 [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: VA					
AMERICAN FUNDS 529 ⇒ The Capital Income Builder [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: VA					
Cincinnati Postal Credit Union [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Savings					
Cincinnati Postal Credit Union [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Joshua					
Cincinnati Postal Credit Union [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Maeve					
Cincinnati Postal Credit Union [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Davis					
Cincinnati Postal Credit Union [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Gentry					
Clearview Federal Credit Union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Military Savings/Checking					
Clearview Federal Credit Union [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
DESCRIPTION: Savings					
FIDELITY IRA ⇒ Agnico Eagle Mines LTD Com [MF]		\$1,001 - \$15,000	Tax-Deferred		
FIDELITY IRA ⇒ Fidelity Government Cash Reserves [MF]		\$1 - \$1,000	Tax-Deferred		
First Tennessee Bank Savings [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Son Joshua's Savings					
First Tennessee Bank Savings [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Daughter Maeve Savings					
First Tennessee Bank Savings [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Son Davis Joint Account					
First Tennessee Bank Savings [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Son Gentry Joint Account					
First Tennessee Bank Savings [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Fliegen Farms Account					
FIRST TENNESSEE CHECKING [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Home Federal [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Savings					
UNITED 401K ⇒ STABLE VALUE FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ American AMCAP Fund CI R-4 [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ American Century Mid Cap [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ American Fds Growth Fund of Amer CI R-4 [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ American Fds Washington Mutual Inv CI R-4 [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ American Funds New World [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ Dodge and Cox Stock Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ DOUBLELINE LOW DURATION BOND FUND [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ Schwab International Core Equity Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ Thornburg Limited-Term Income Fund CI R5 [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ Vanguard Small Cap Index [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
UNIVERSITY GENERAL SURGEONS PROFIT SHARING ⇒ Vanguard Total Stock Mkt Index Admiral Shs [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
USAA ⇒ USAA Income Stock Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
USAA Checking [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	None
USAA ROTH IRA ⇒ USAA Growth & Income Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
USAA ROTH IRA ⇒ USAA Growth Income [MF]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
VOYA ORP ⇒ VANGUARD TRGT RETIRE 2030 FNDIV [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
VOYA VF 2007 ⇒ AMERICAN FUNDS EUROPACIFIC R4 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
VOYA VF 2007 ⇒ AMERICAN FUNDS GROWTH FND R4 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
VOYA VF 2007 ⇒ FRANKLIN SMALL CAP VALUE VIPFD2 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
VOYA VF 2007 ⇒ LARGE CAP VALUE PORT INST [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
VOYA VF 2007 ⇒ VV CLARION GLOBAL RL EST PRT INST [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
Mcleod Health	Spouse Site Survey/Consultant	N/A	\$1,200.00
Hartsville HMA	Spouse Site Survey/Consultant	N/A	\$1,200.00
Starnes Davis Florie	Chart Review	N/A	\$3,000.00
South College	Teaching		\$600.00
DHHS Controller's Office	Site Survey/Consultant	\$.00	\$2,029.00
University General Surgeons	spouse salary	\$75,000.00	\$281,496.86
University of Tennessee	spouse salary	\$8,500.00	\$27,628.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

#### **SCHEDULE F: AGREEMENTS**

None disclosed.

#### **SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

#### **SCHEDULE A ASSET CLASS DETAILS**

- AMERICAN FUNDS 529 (Owner: SP)  
LOCATION: VA  
DESCRIPTION: JOSHUA, MAEVE, DAVIS, GENTRY
- FIDELITY IRA  
DESCRIPTION: ROLLOVER IRA
- UNITED 401K
- UNIVERSITY GENERAL SURGEONS PROFIT SHARING (Owner: SP)  
DESCRIPTION: EMPLOYER RETIREMENT PLAN
- USAA (Owner: SP)
- USAA ROTH IRA (Owner: SP)
- USAA ROTH IRA
- VOYA ORP (Owner: SP)  
DESCRIPTION: UT PLAN
- VOYA VF 2007 (Owner: SP)

#### **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes  No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes  No

#### **CERTIFICATION AND SIGNATURE**

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Sarah Ashley Nickloes , 05/15/2018